User Guide

Rel 9

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Welcome to Bontact

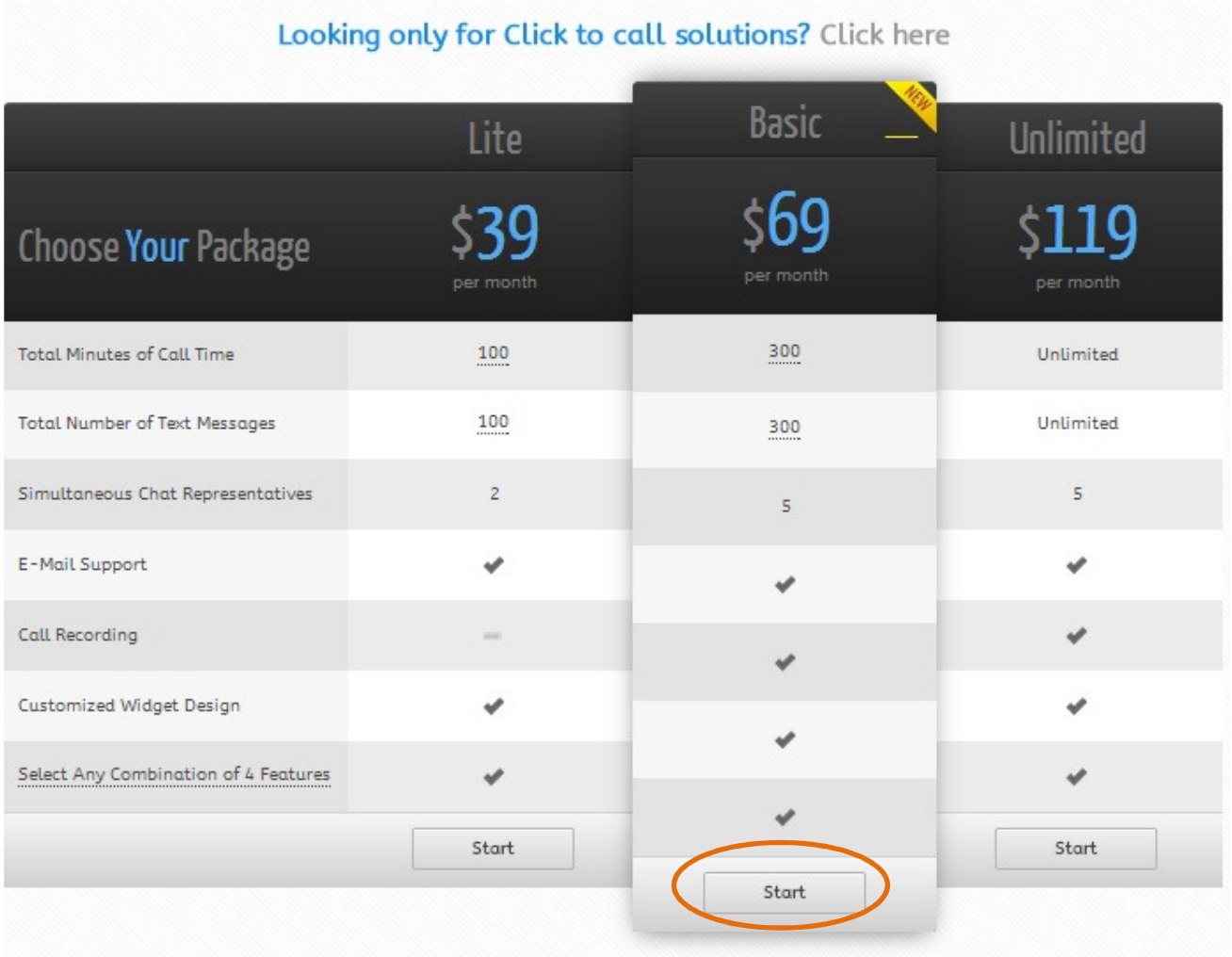
If you are handling the registration yourself and have not received a username and password, please visit www.Bontact.com

Thank you for visiting our site.

Please click **Buy Now**.

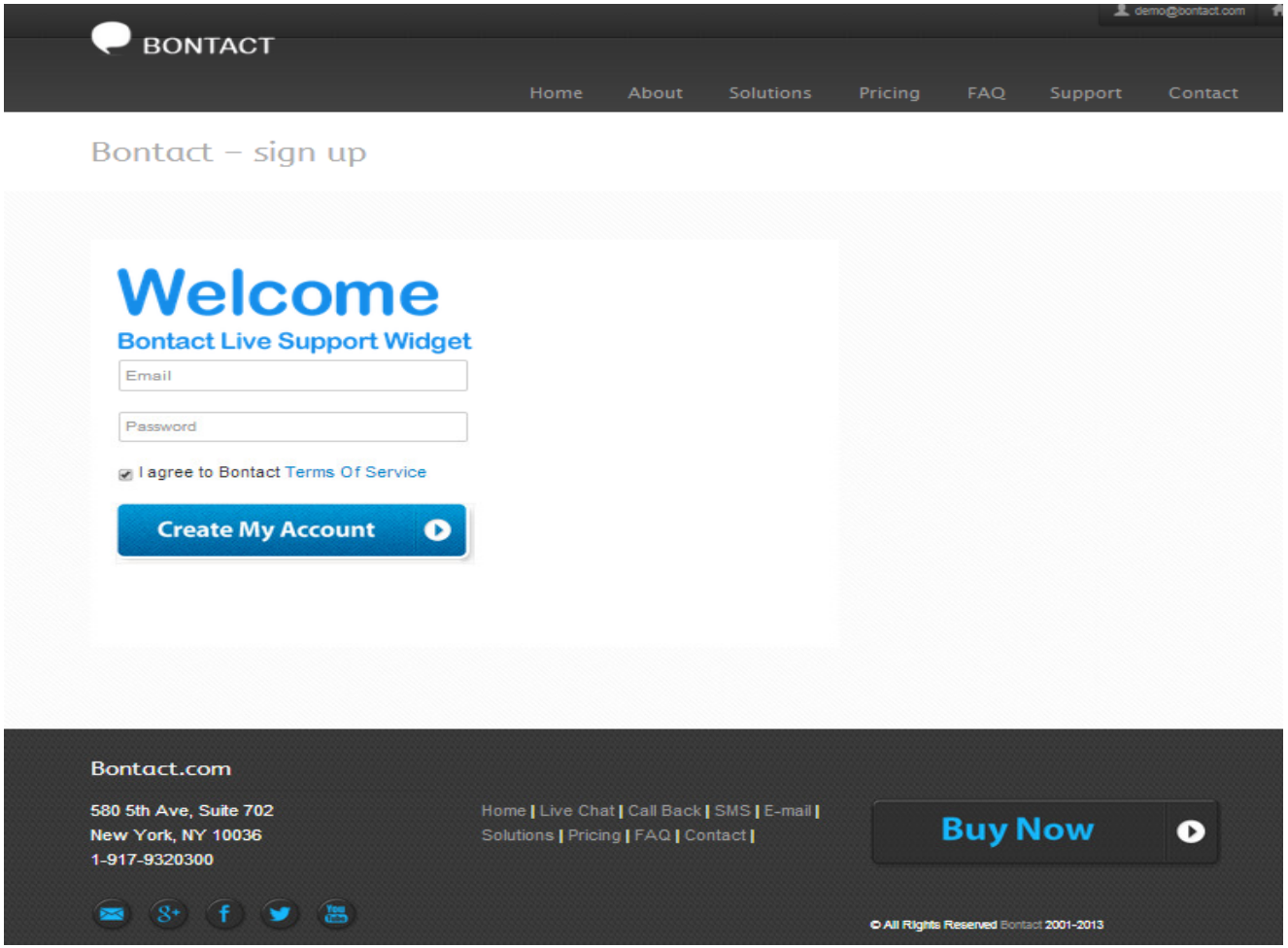
If a representative has performed the registration for you, please skip to page 5 in order to register.

Selecting a package



Select the package of your choice by clicking **Start.**

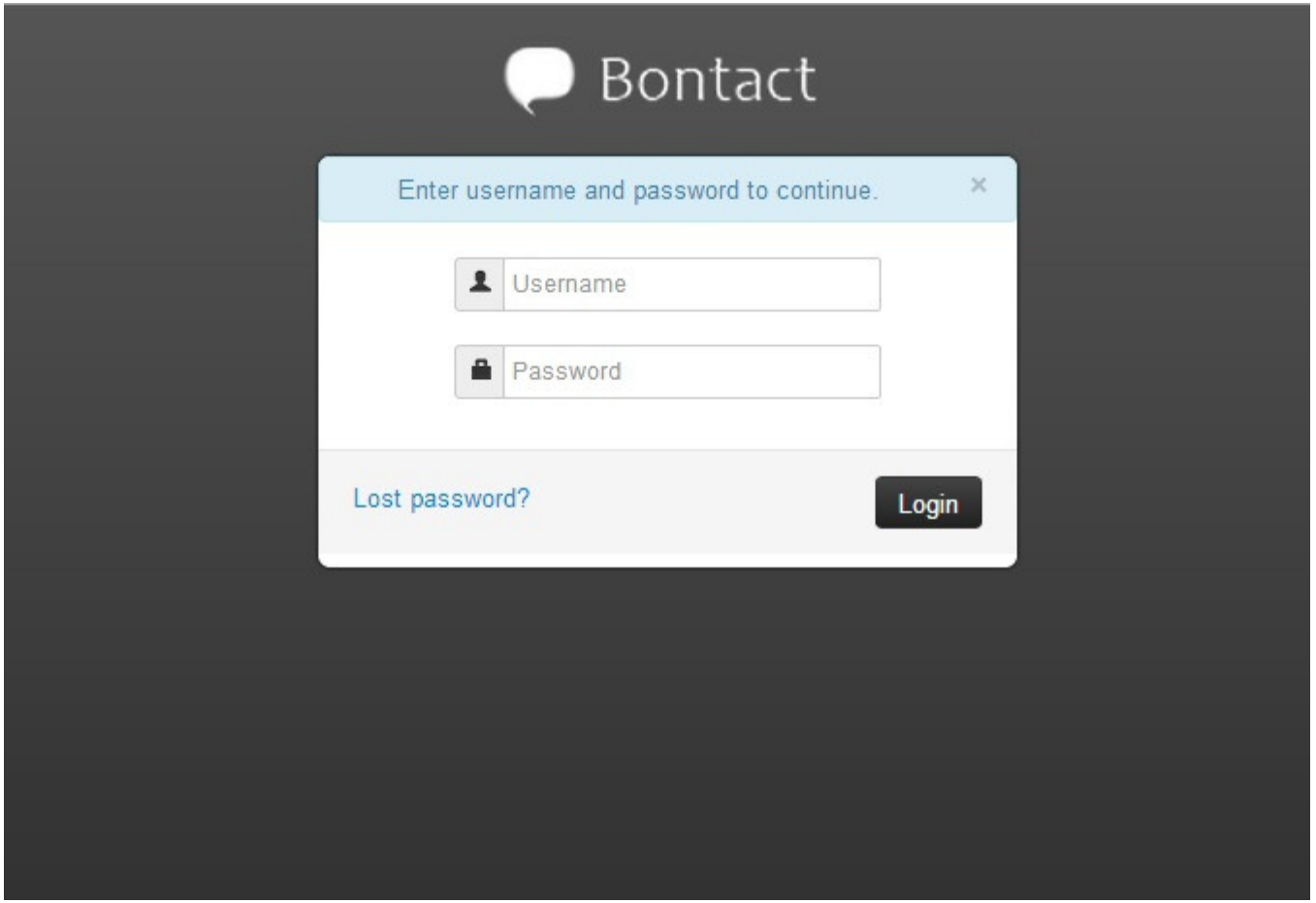
Registration



Register using your email and a password. Any future logins will utilize these details.

A registration notice has been sent to your email. Check your email and confirm the registration by clicking **Activate Your Account**.

Logging In



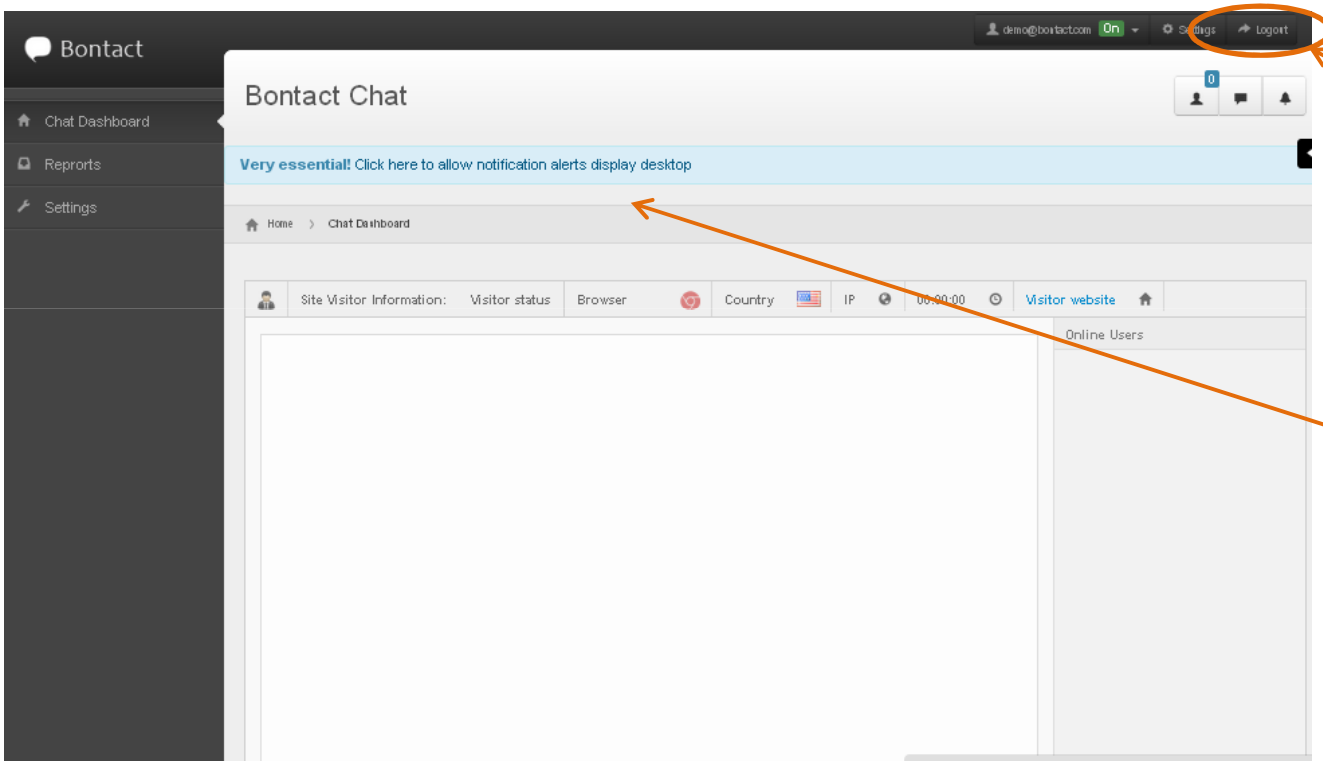
Enter the username and password for logging into the Bontact Interface.

The system will enable you to communicate with your web visitors.

We recommend that you enter the system at the beginning of each workday.

Your User Area

Your user area in the Bontact website is the interface through which you receive visitor notices and edit the widget settings.
Logging in to the Bontact User Interface requires the details you entered at registration.



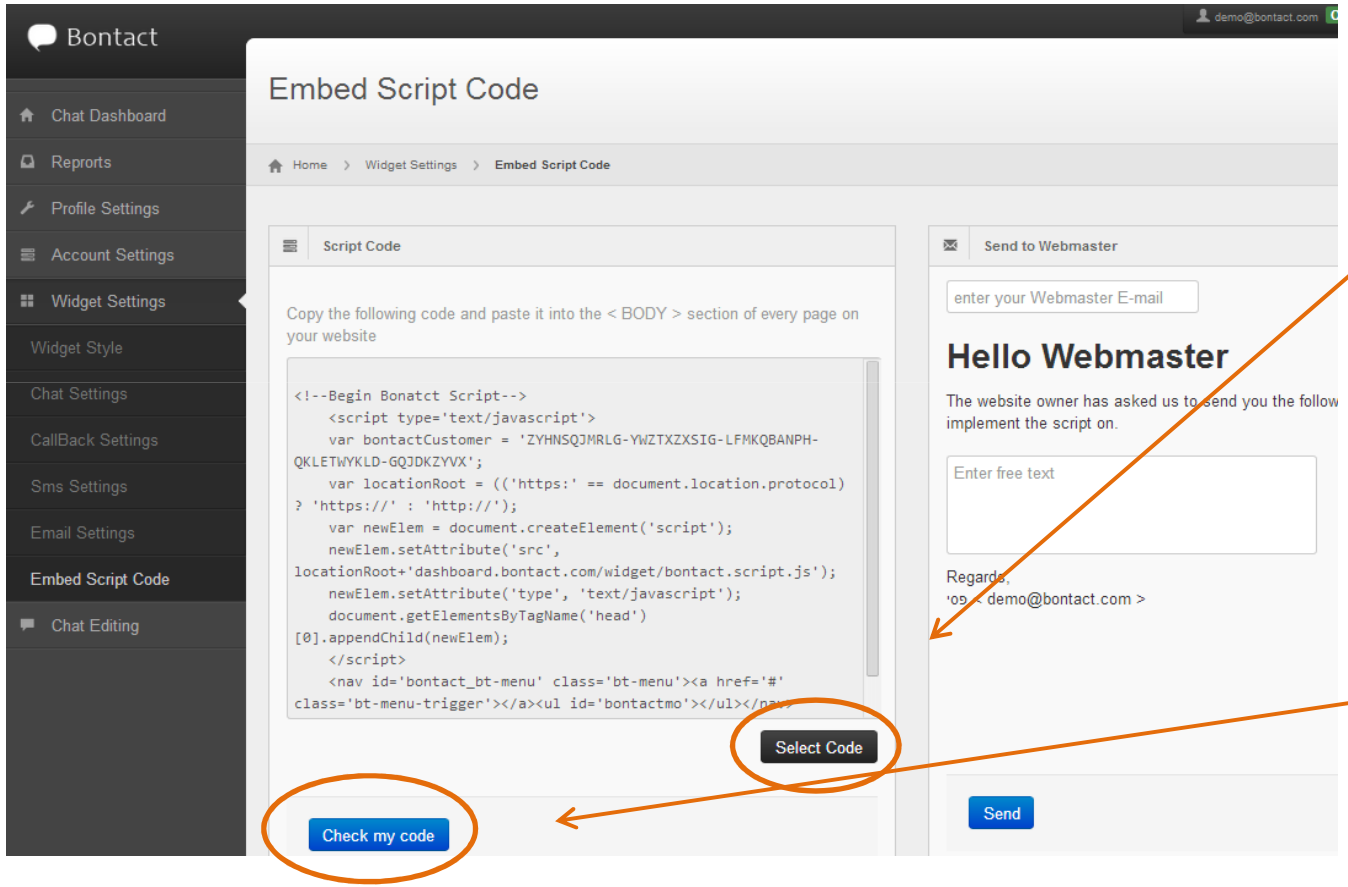
Please enter the username and password after clicking the **Login** button on the top right.

Log out using the **logout** button in the same place.

During the first login, we recommend that you confirm **Desktop Notifications** at the top line, and re-confirm on the browser bar. This way you will get an alert on incoming emails even if you are currently using other applications on your computer.

Embed Script Code

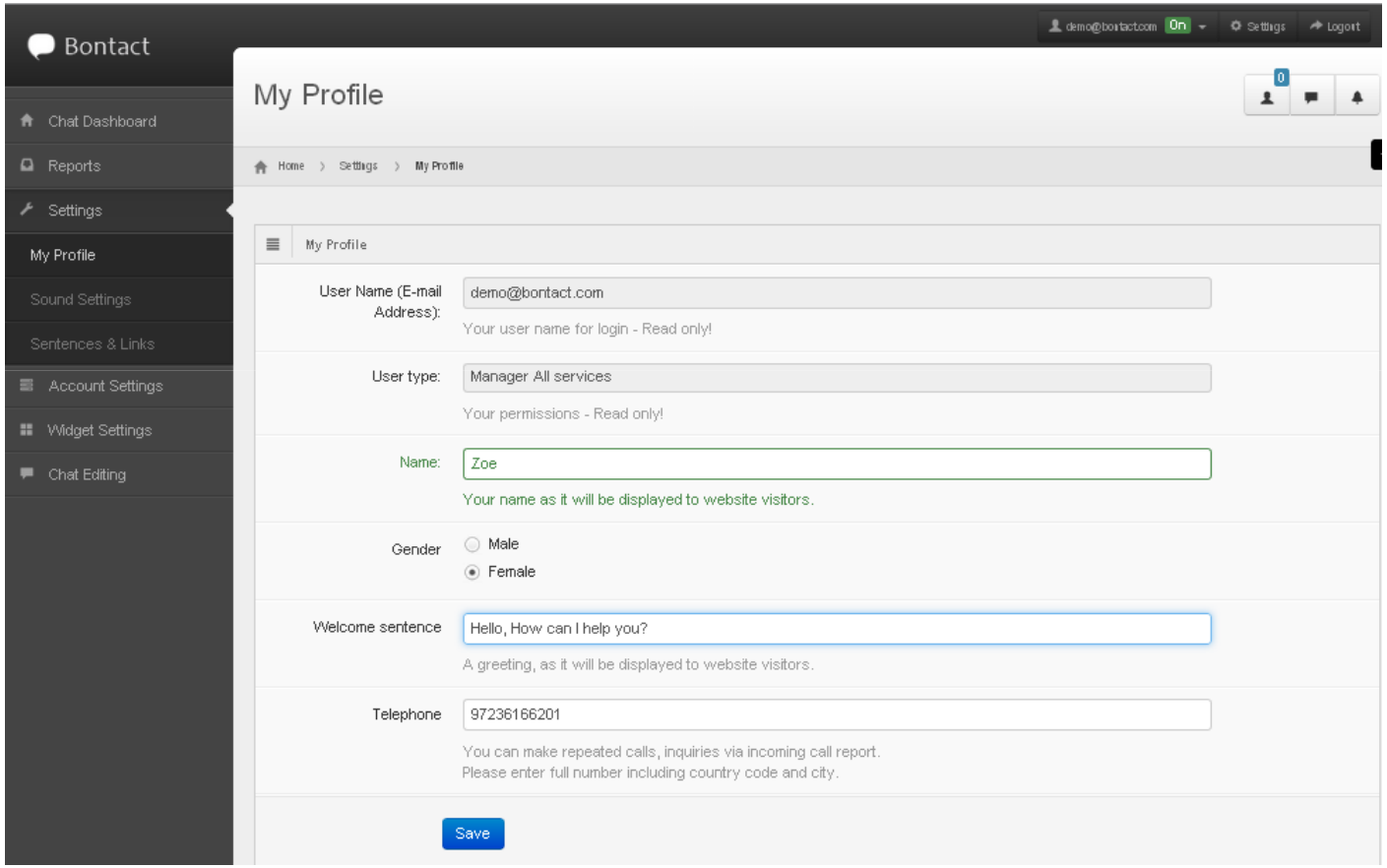
Receiving and embedding the code - In order for the widget to appear on your website, please embed a specific code in your web. The code can be found in the tab: Settings->Widget Settings->Embed Script Code.



The code appears on the left side of the screen. You can select it by clicking **Select Code** and embedding it in your website.

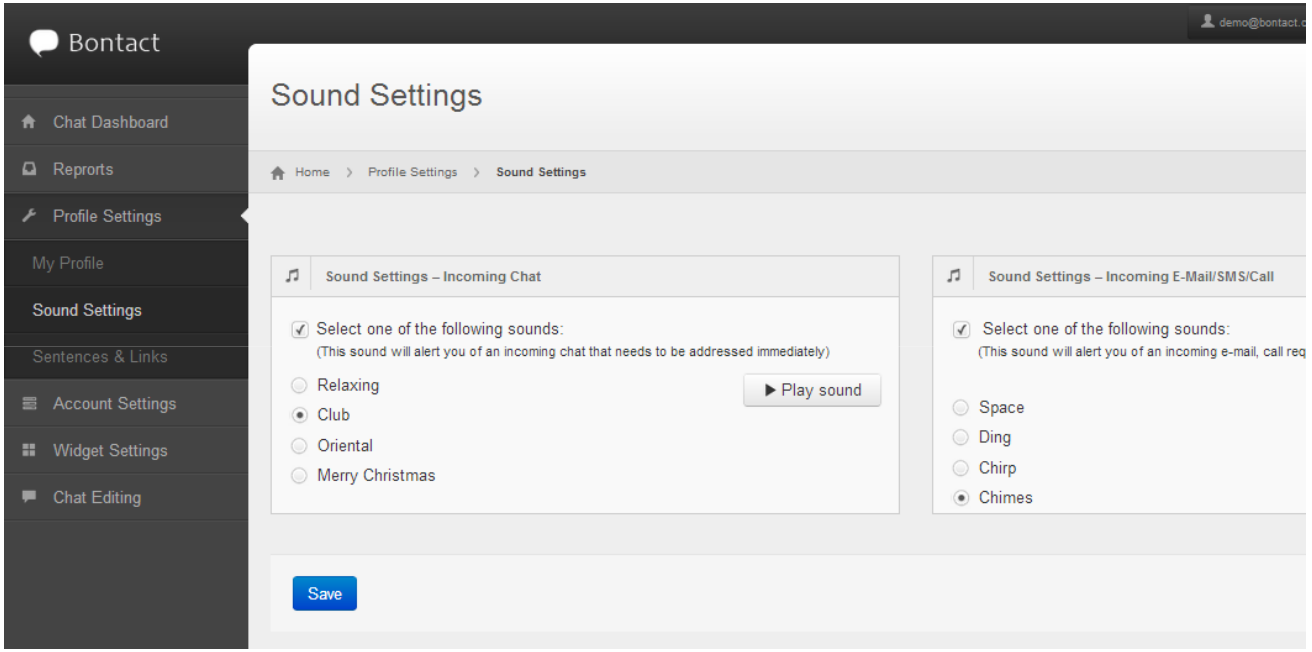
Alternatively, you can send it to your web builder for embedding. On the upper right side of the screen, enter the email of your web builder or IT professional. You can add a short explanation in the text box, and when you click send, the email will be sent. After you ensure the code has been embedded in your website, click **Check My Code**, to ensure it was properly embedded.

My Profile – Preliminary Settings



When you first log in to the system, or when you want to make changes in your profile settings, please select **Settings->Profile Settings->My Profile**
Here you can change your name as it appears to visitors, as well as the opening sentence your visitors will see when you get his/her chat request, or when you invite him/her to a chat. In the telephone field, enter your number so you can answer the incoming calls from the interface. Please remember to save your changes.

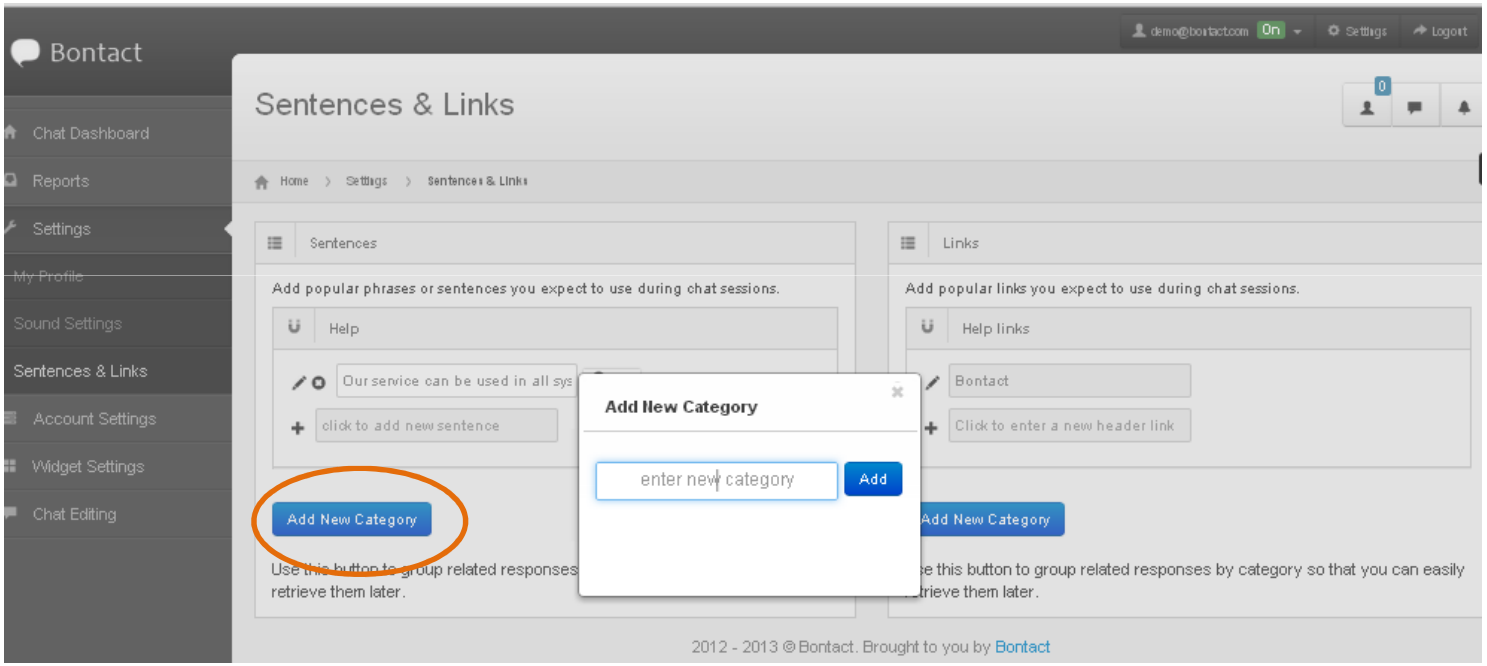
Sound Settings



Selecting the tab **Settings >Profile Settings >Sound Settings** will enable you to define the sound that will be heard when a chat or another type of contact is initiated (call, SMS, mail). Please remember to save in order to retain your changes.

Sentences & Links

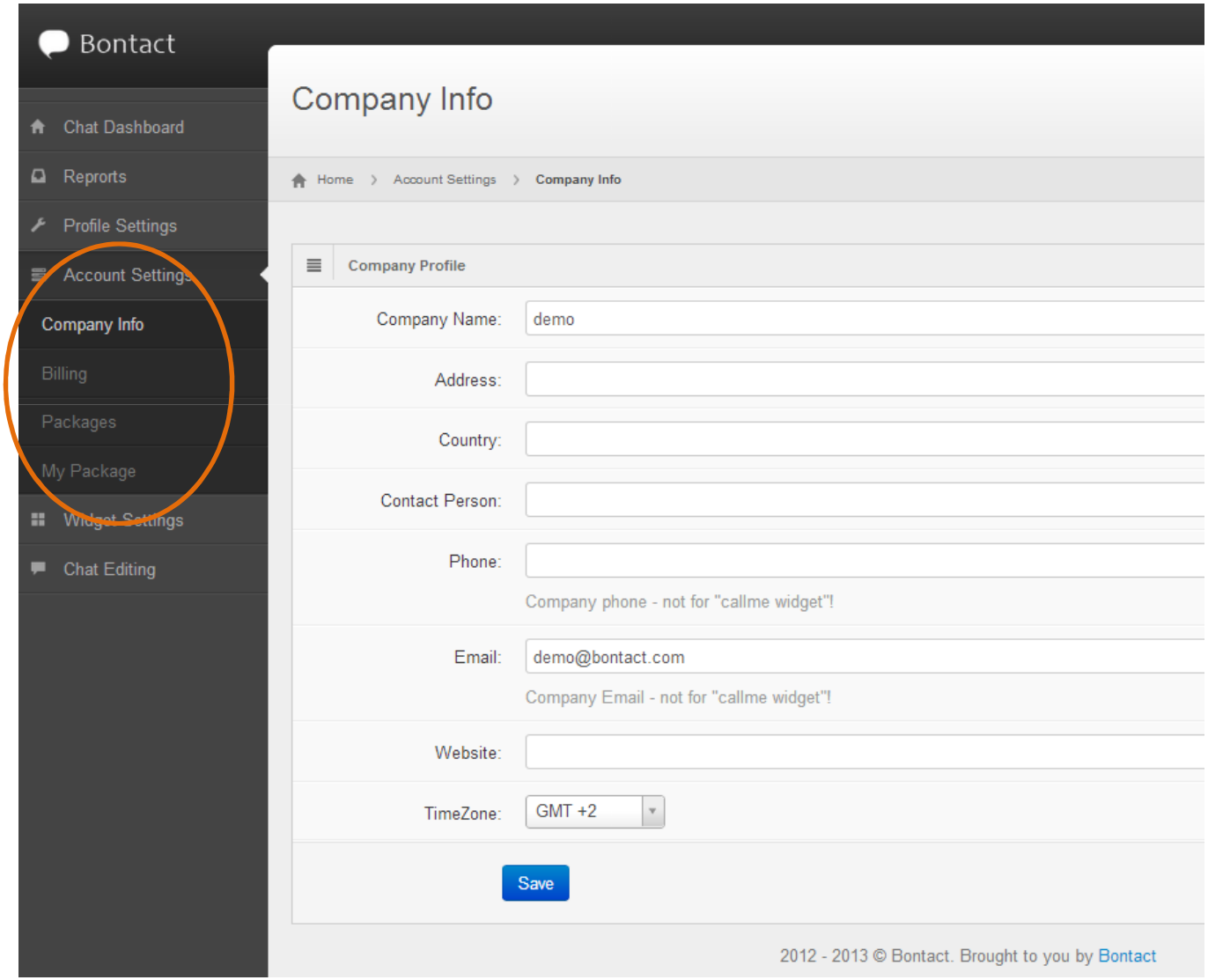
Another option in the Profile Edit window is entering pre-defined sentences, which are frequently used in chats – answering Frequently Asked Questions, standard suggestions you offer visitors, such as costs, work hours and office addresses.



You can also enter URLs to which you refer customers. Settings-Profile Settings-Sentences and Links.

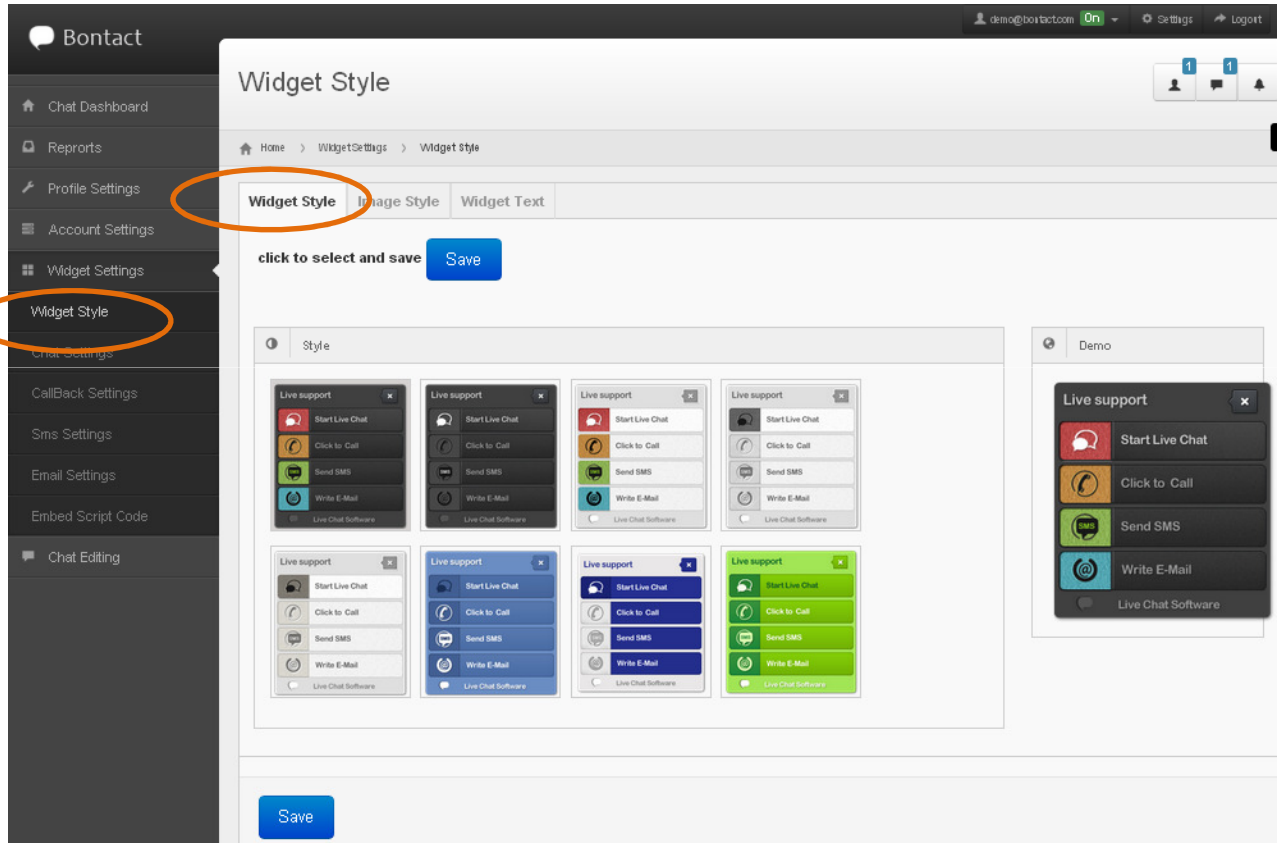
Another useful function for fast orientation defining categories according to the different subjects of the links and sentences. For instance- Open, Close and Additional Sites.

Company Info – Account Settings



After editing your profile, you can edit the general account details in **Settings>Account settings.**
Using the different tabs, you can update the corporate details, enter your credit card, select a package and view your package details.

Widget Settings

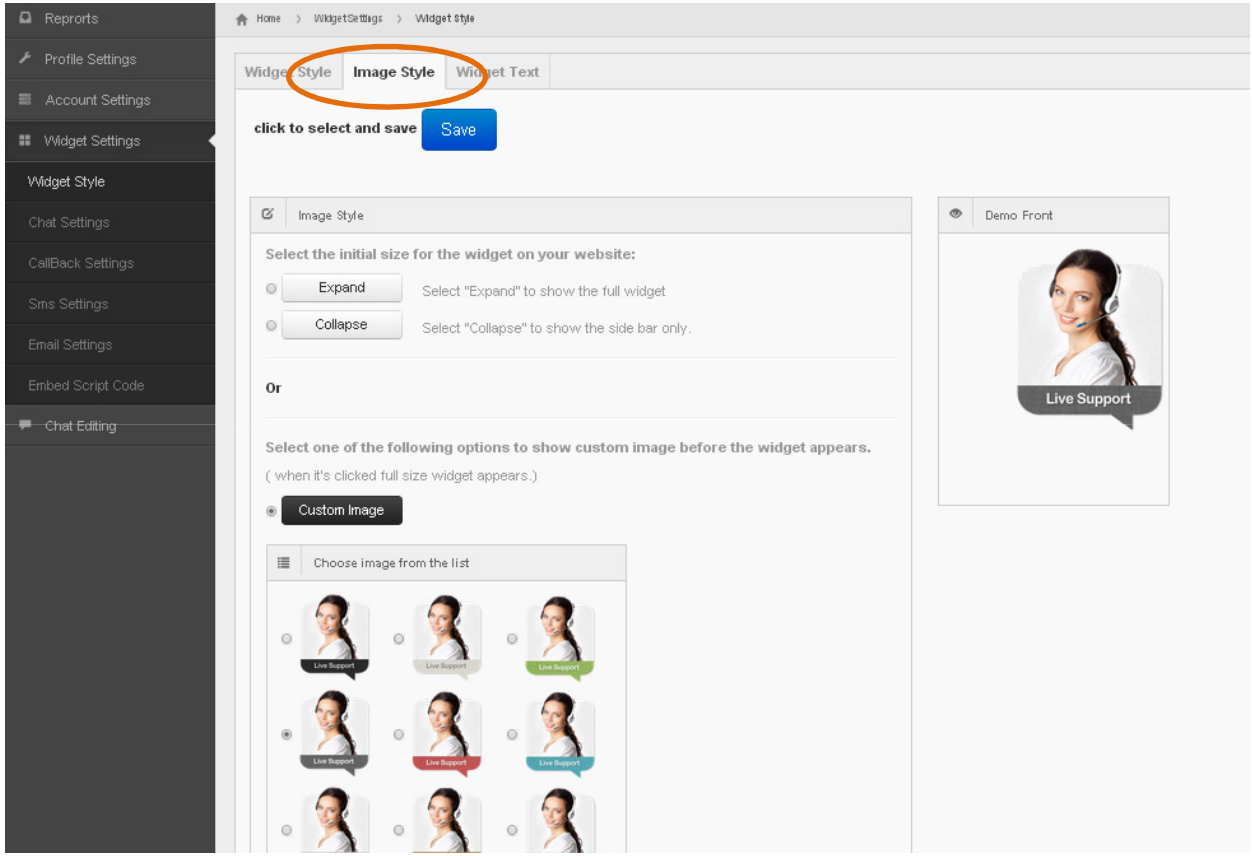


The Widget Settings window enables you to select the design and text for your Bontact Widget.
Important – after selecting the options of your choice, remember to save.

Widget Design

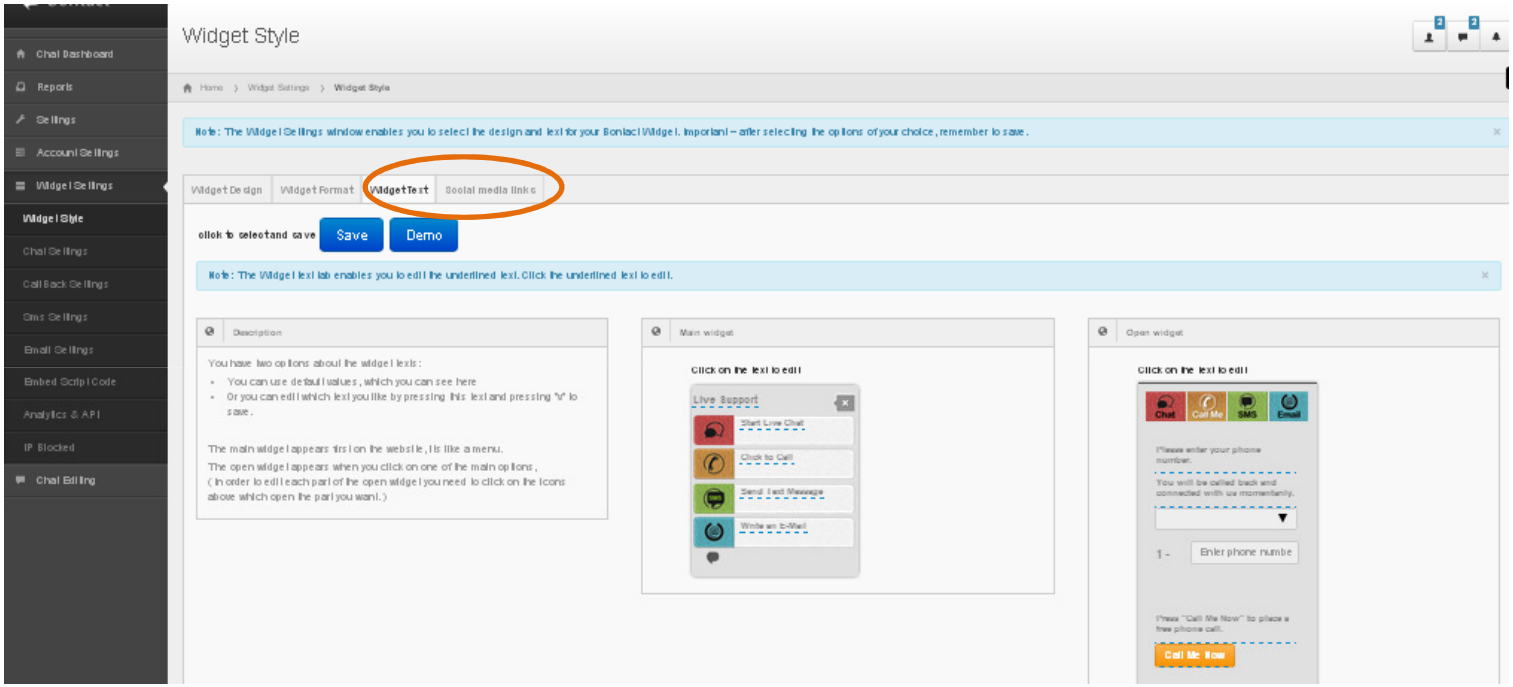
The Widget Design tab enables you to select a design for your Bontact widget, which will be maintained throughout your website.
In the case that you are using a first-level widget of your own design, which leads to the Bontact widget as a second-level widget, the 2nd level Bontact widget will maintain the design you selected.

Widget Format



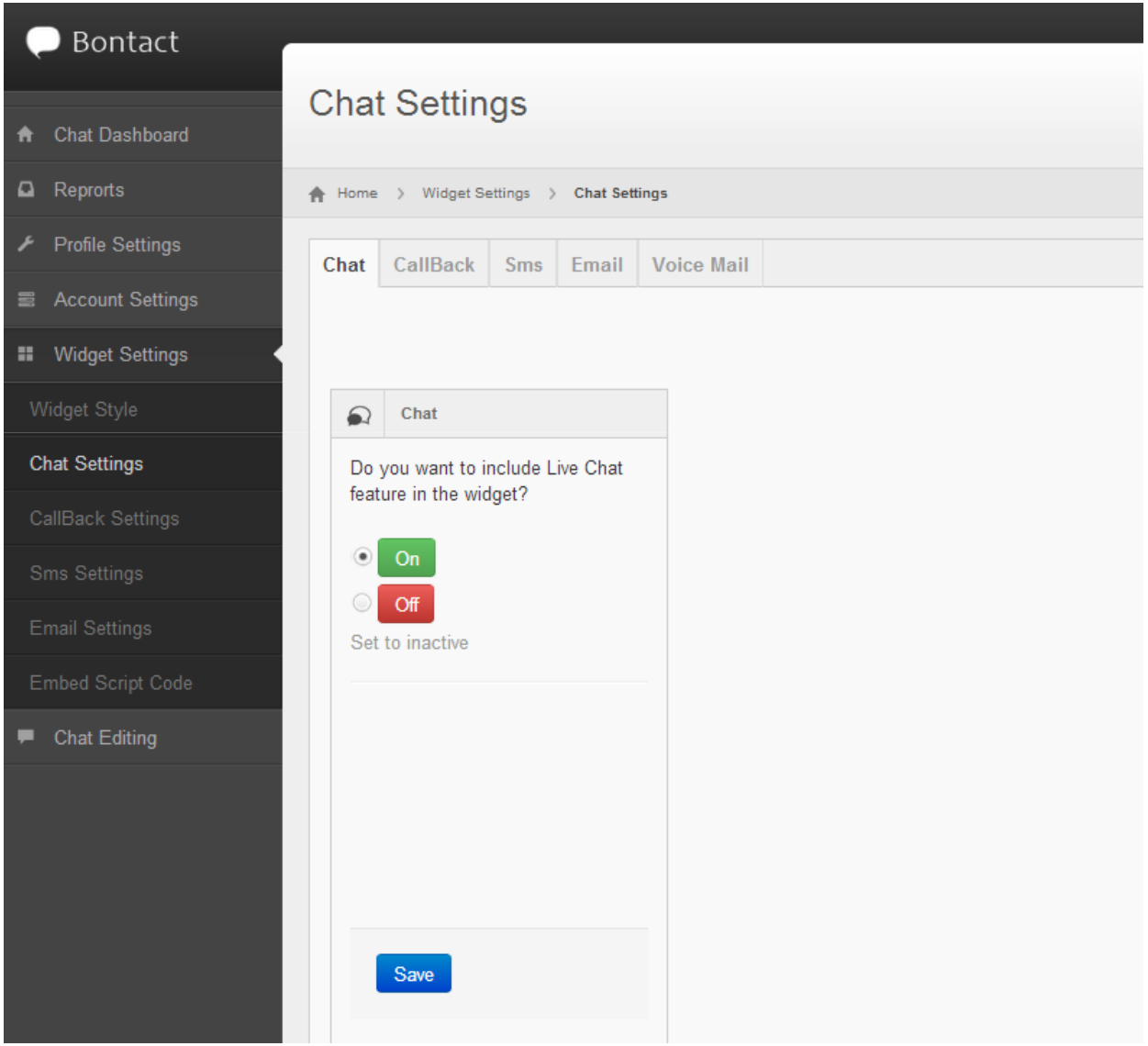
The Widget Format tab enables you to select a fully-displayed widget or the widget's sidebar only as the default option. You can also select a custom image as a first-level widget, which will lead to the Bontact widget upon a user click.

Widget Text



The Widget text tab enables you to edit the underlined text. Click the underlined text to edit.

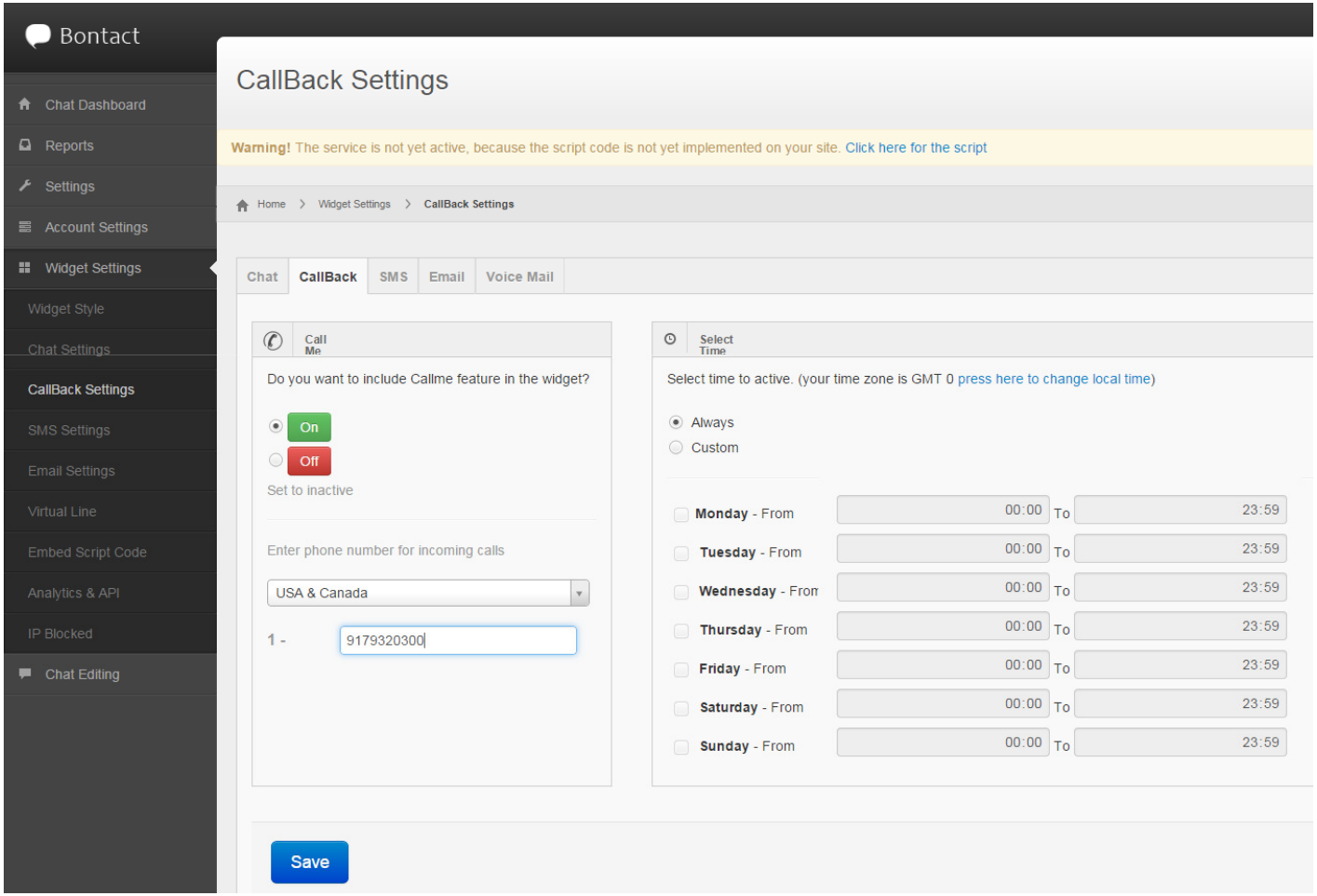
Chat Settings



Here you can define whether the chat will be active or inactive.

Callback Settings

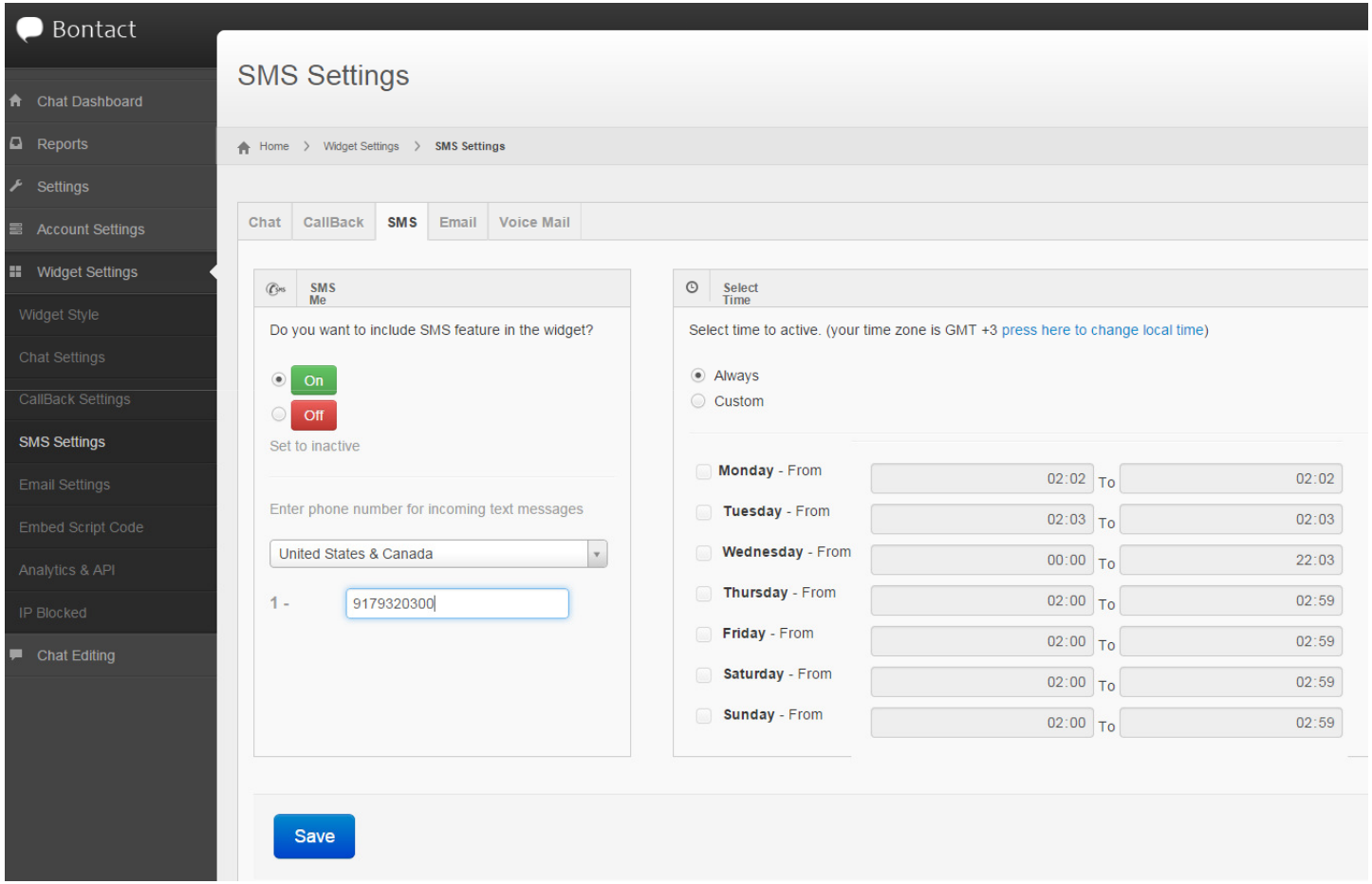
In the callback settings you can select whether the callback option will be active or inactive.



In the case that you selected “active”, please enter a phone number to which the calls will be forwarded. It can be a mobile or landline number.

Enter the number in the field on the left side of the screen. On the right you can define work hours. The default is 24/7. To change this, click Custom and update the hours on the right. Please remember to save your changes.

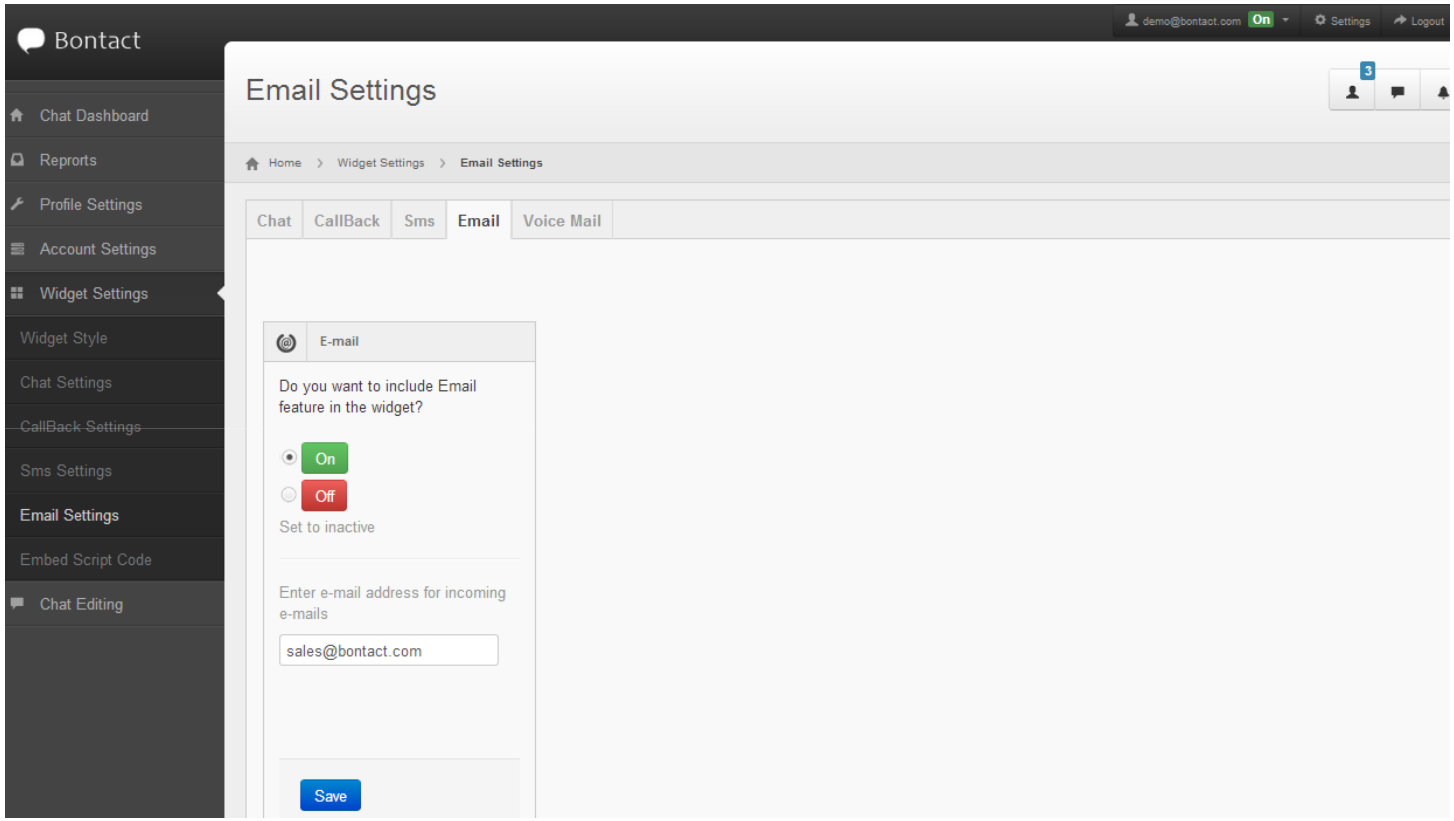
SMS Settings



In the SMS settings tab you can define whether you want the SMS messages from the website to be activated.

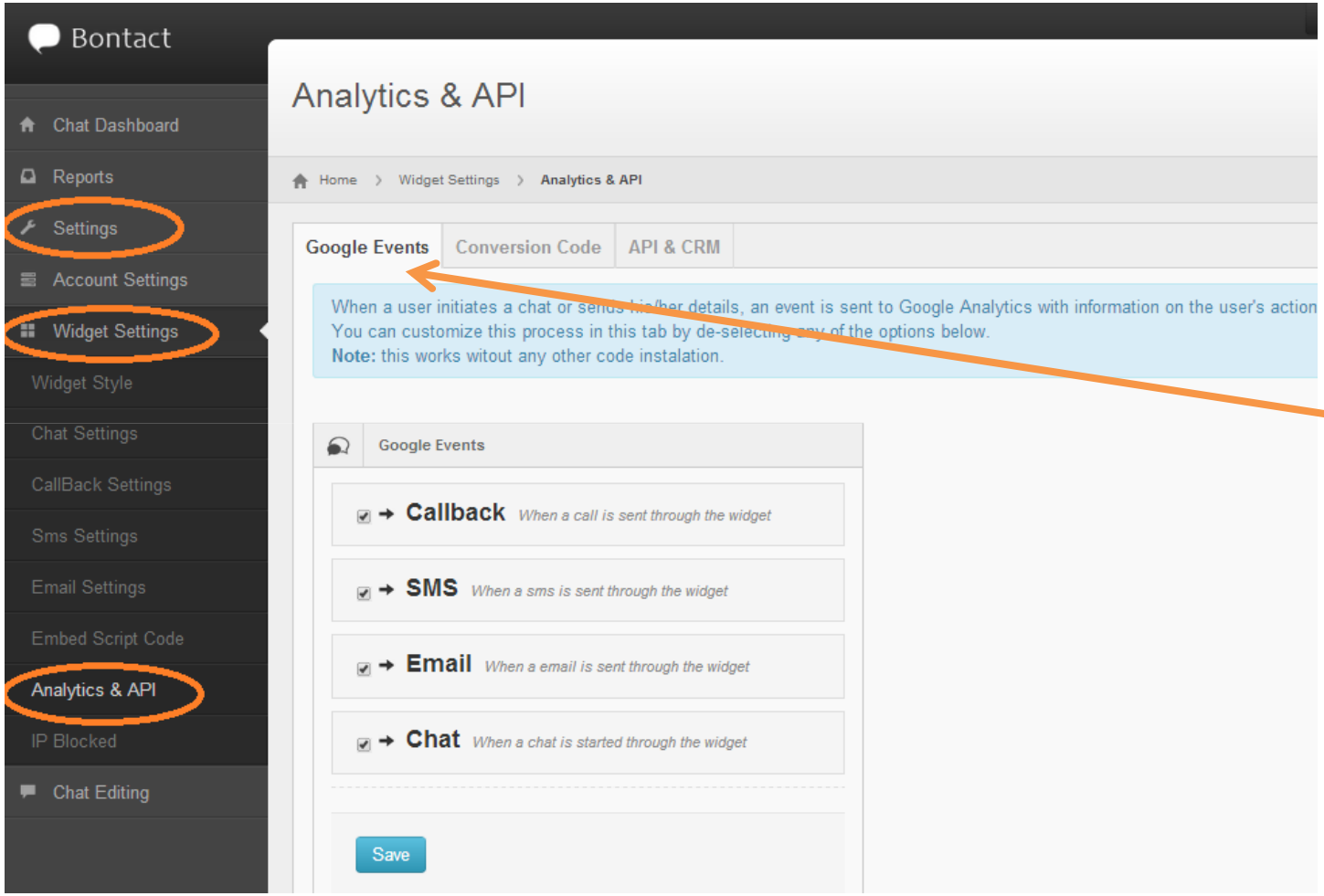
If you selected activate, please enter the mobile phone number to which the SMS will be forwarded Also, you can select the work hours which will be displayed to the visitors.
Remember to save.

Email Settings



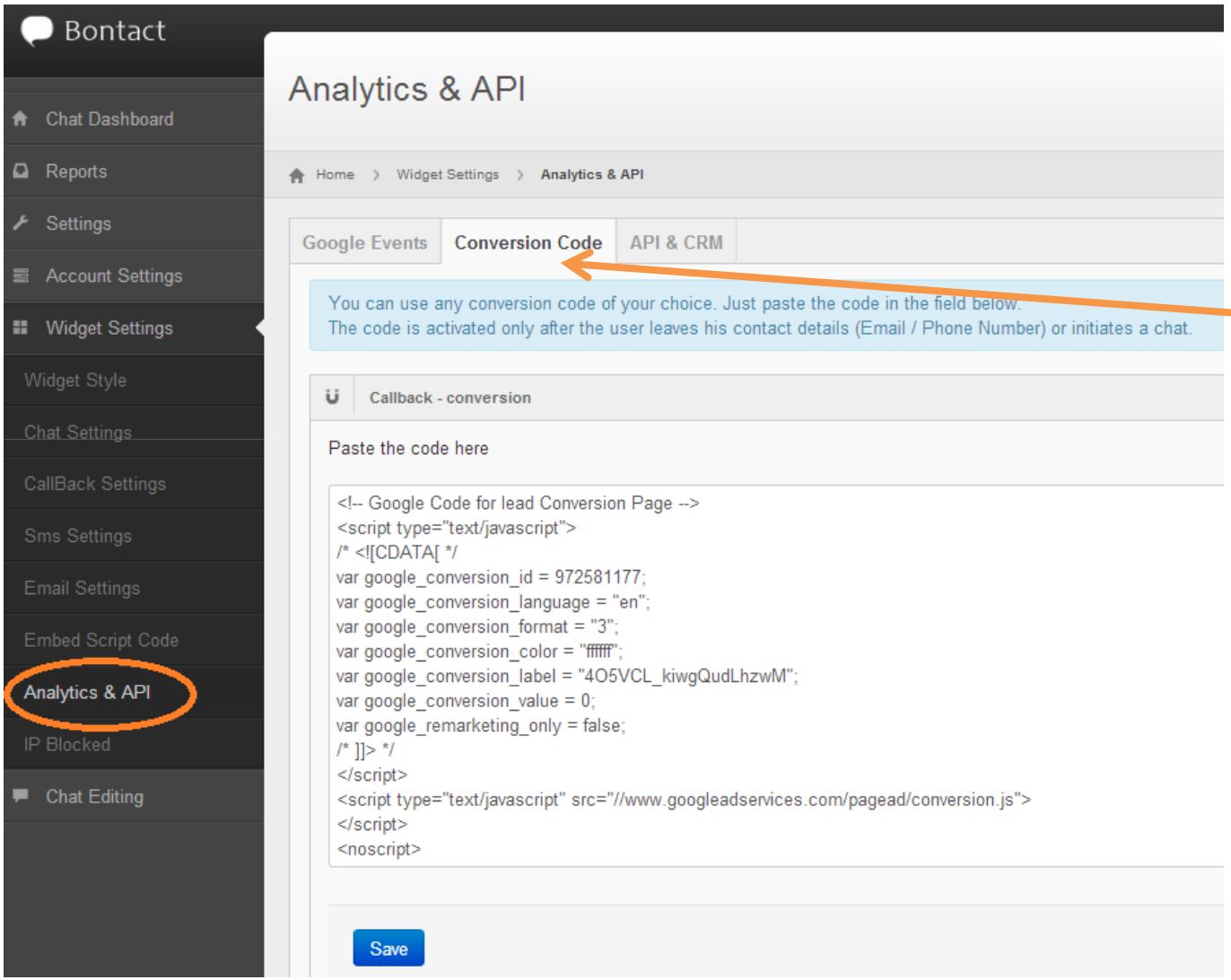
In the Email settings you can define whether visitors can leave messages that will be sent to your email.
Please enter your email and save your changes.

ANALYTICS & API


Bontact
Chat Dashboard
Reports
Settings
Account Settings
Widget Settings
Widget Style
Chat Settings
CallBack Settings
Sms Settings
Email Settings
Embed Script Code
Analytics & API
IP Blocked
Chat Editing
Analytics & API
Home › Widget Settings › Analytics & API
Google Events
Conversion Code
API & CRM
When a user initiates a chat or sends his/her details, an event is sent to Google Analytics with information on the user's action
You can customize this process in this tab by de-selecting any of the options below.
Note: this works witout any other code instalation.
Google Events
Callback When a call is sent through the widget
SMS When a sms is sent through the widget
Email When a email is sent through the widget
Chat When a chat is started through the widget
Save

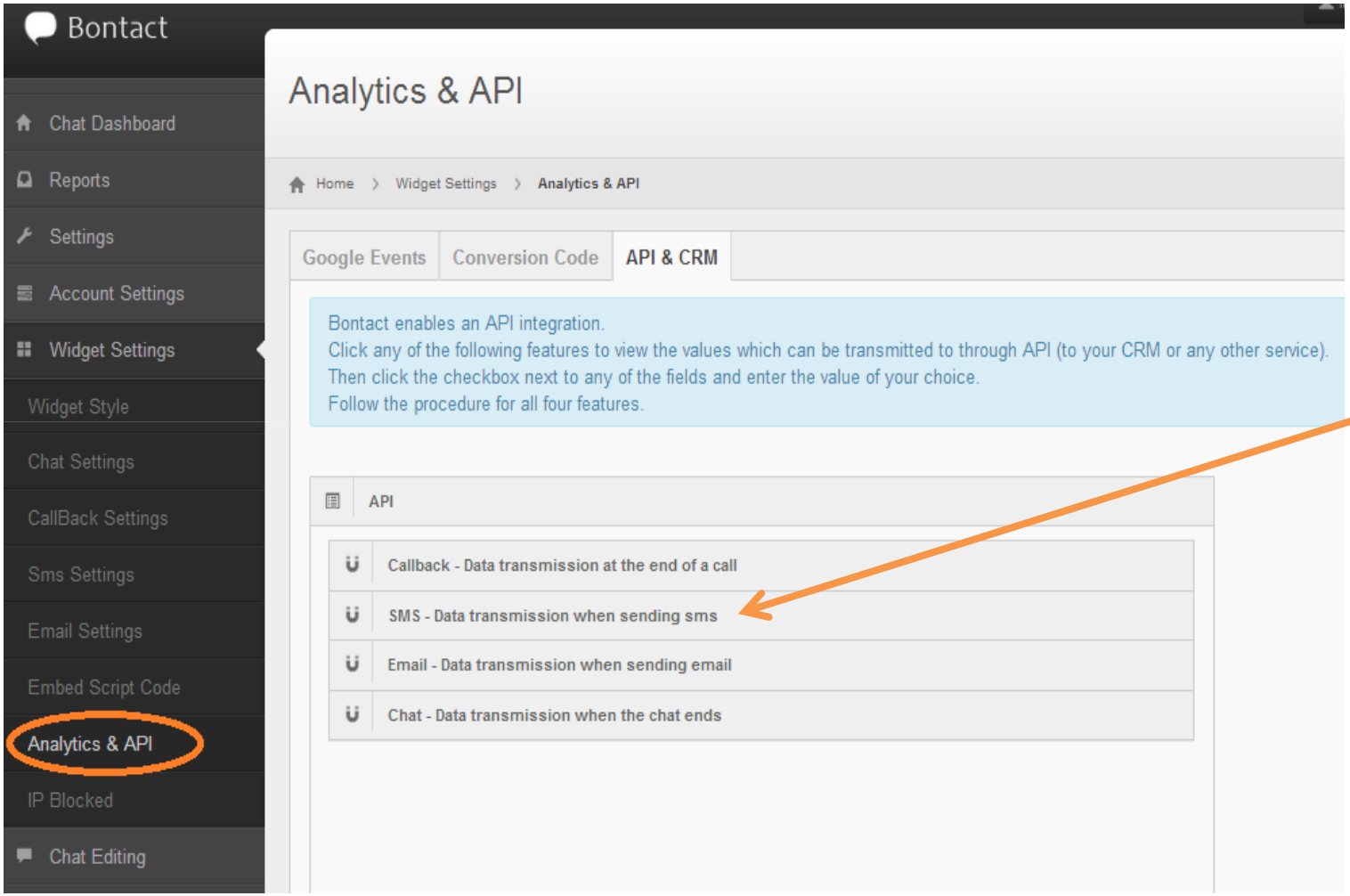
By clicking settings>Widget Settings>Analytics & API,
You will reach a tab where you can produce advanced data, some of which is intended for developers. In the internal **Google Events** tab you can define which visitor actions will generate a Google Analytics report. If you have Analytics monitoring, the actions visitors performed through Bontact will be monitored.

ANALYTICS & API



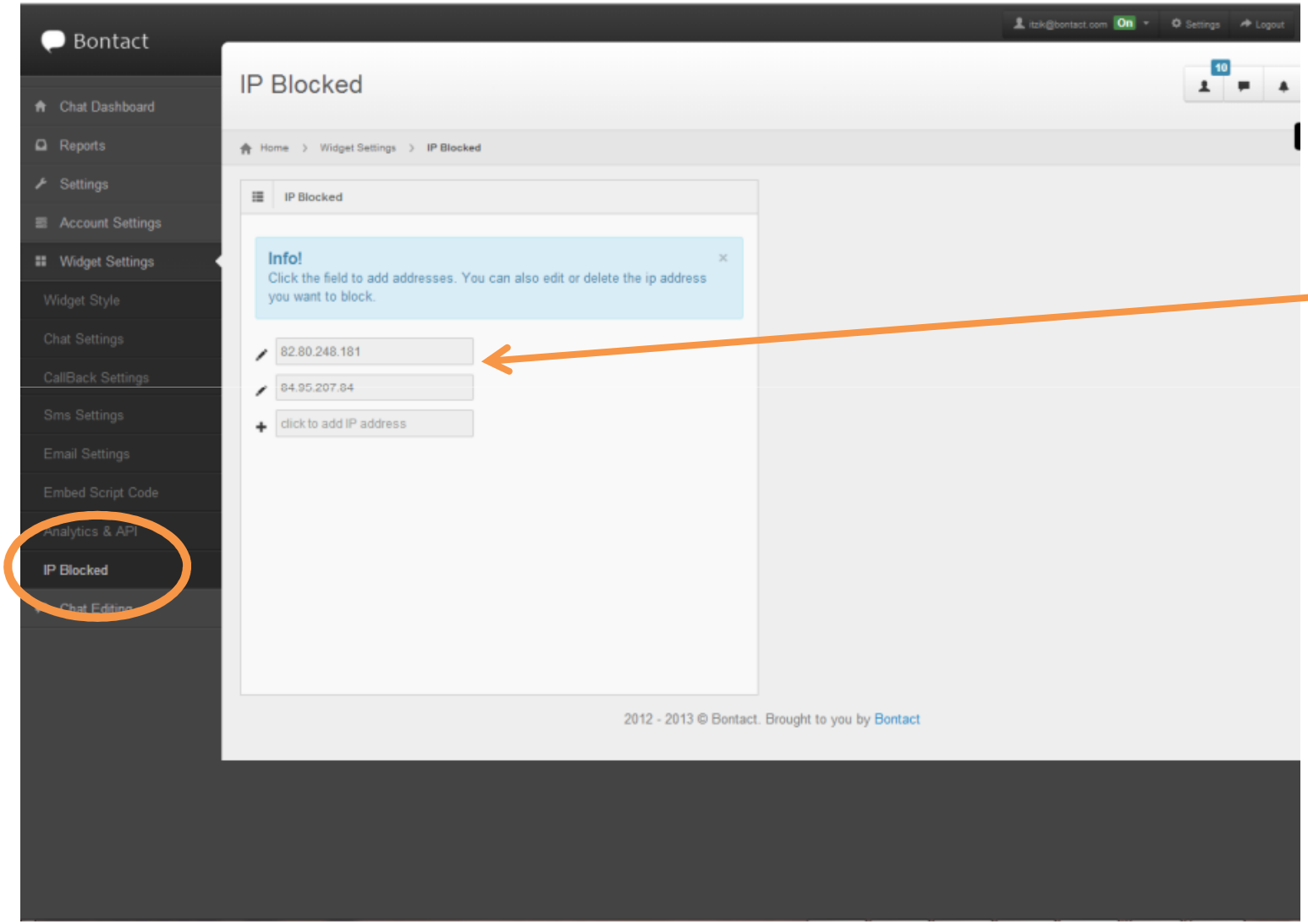
Conversation code
On this tab you can paste any conversion code you have, and data will be sent from the system.

ANALYTICS & API


Bontact
Chat Dashboard
Reports
Settings
Account Settings
Widget Settings
Widget Style
Chat Settings
CallBack Settings
Sms Settings
Email Settings
Embed Script Code
Analytics & API
IP Blocked
Chat Editing
Analytics & API
Home
Widget Settings
Analytics & API
Google Events
Conversion Code
API & CRM
Bontact enables an API integration.
Click any of the following features to view the values which can be transmitted to through API (to your CRM or any other service).
Then click the checkbox next to any of the fields and enter the value of your choice.
Follow the procedure for all four features.
API
Callback - Data transmission at the end of a call
SMS - Data transmission when sending sms
Email - Data transmission when sending email
Chat - Data transmission when the chat ends

This tab is for developers. It enables integrating Bontact data with your CRM. Click any of the four **Bontact applications** and enter the relevant values into the fields.

IP Blocked

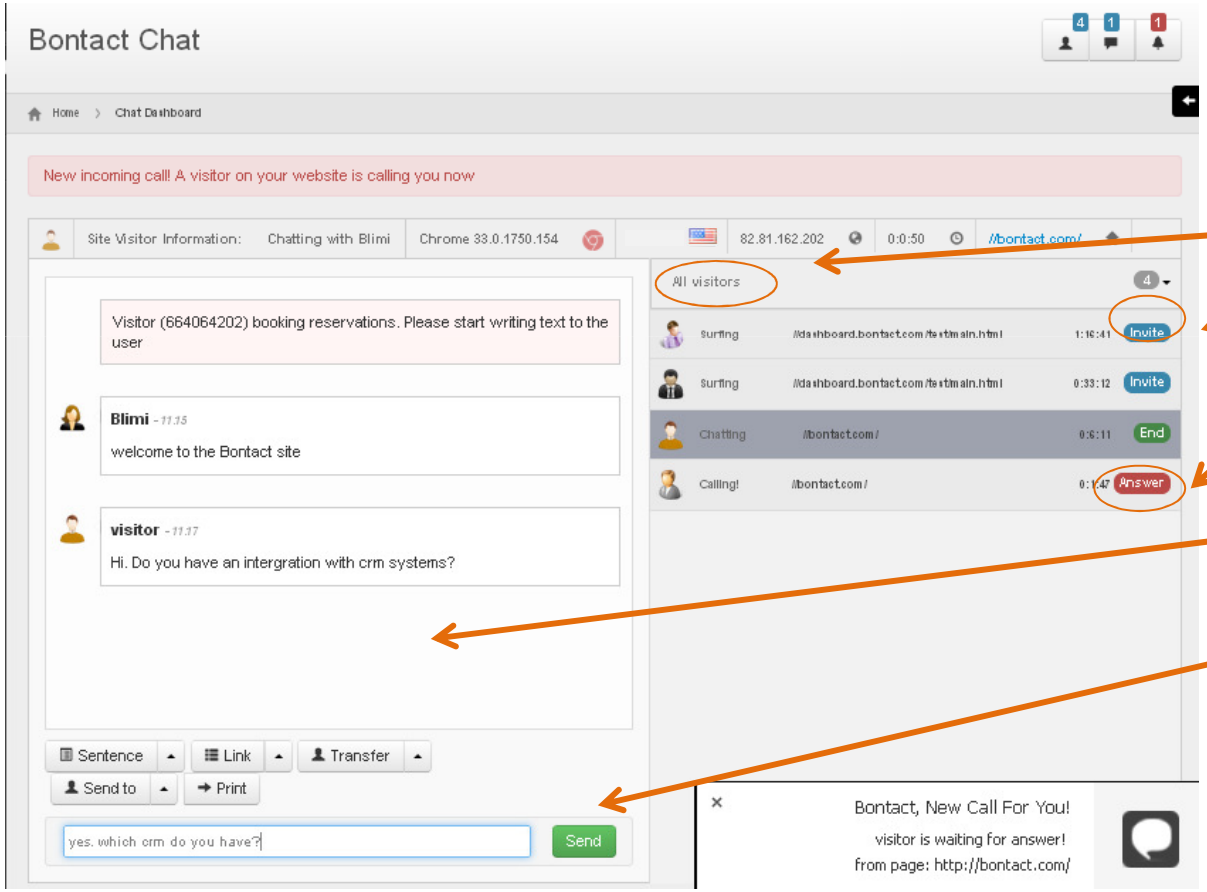


By clicking: Settings> Widget settings> Ip blocked you will reach a tab in which you can **enter IP addresses** for which do not need to be displayed.

You can enter IP addresses of the computers in your business, or any other address for which you do not want to initiate chats.
Any address you enter here will not appear in the list of visitors.

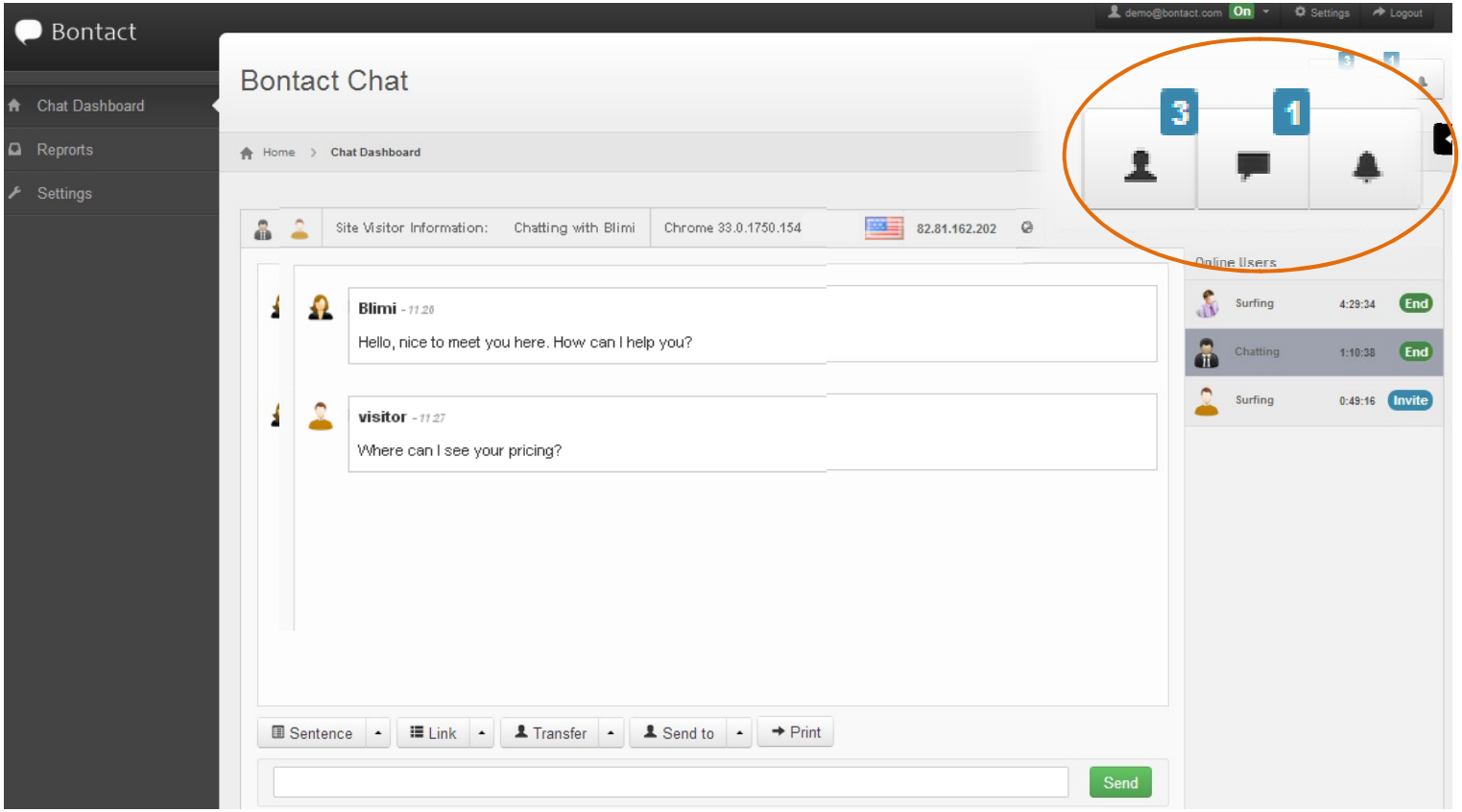
Getting to Know the Dashboard

The screen you will see in any future login is the Dashboard screen. You can reach it by clicking the top tab on the main menu (chat dashboard). Here you can view your web visitors, initiate contact with them or answer their questions.



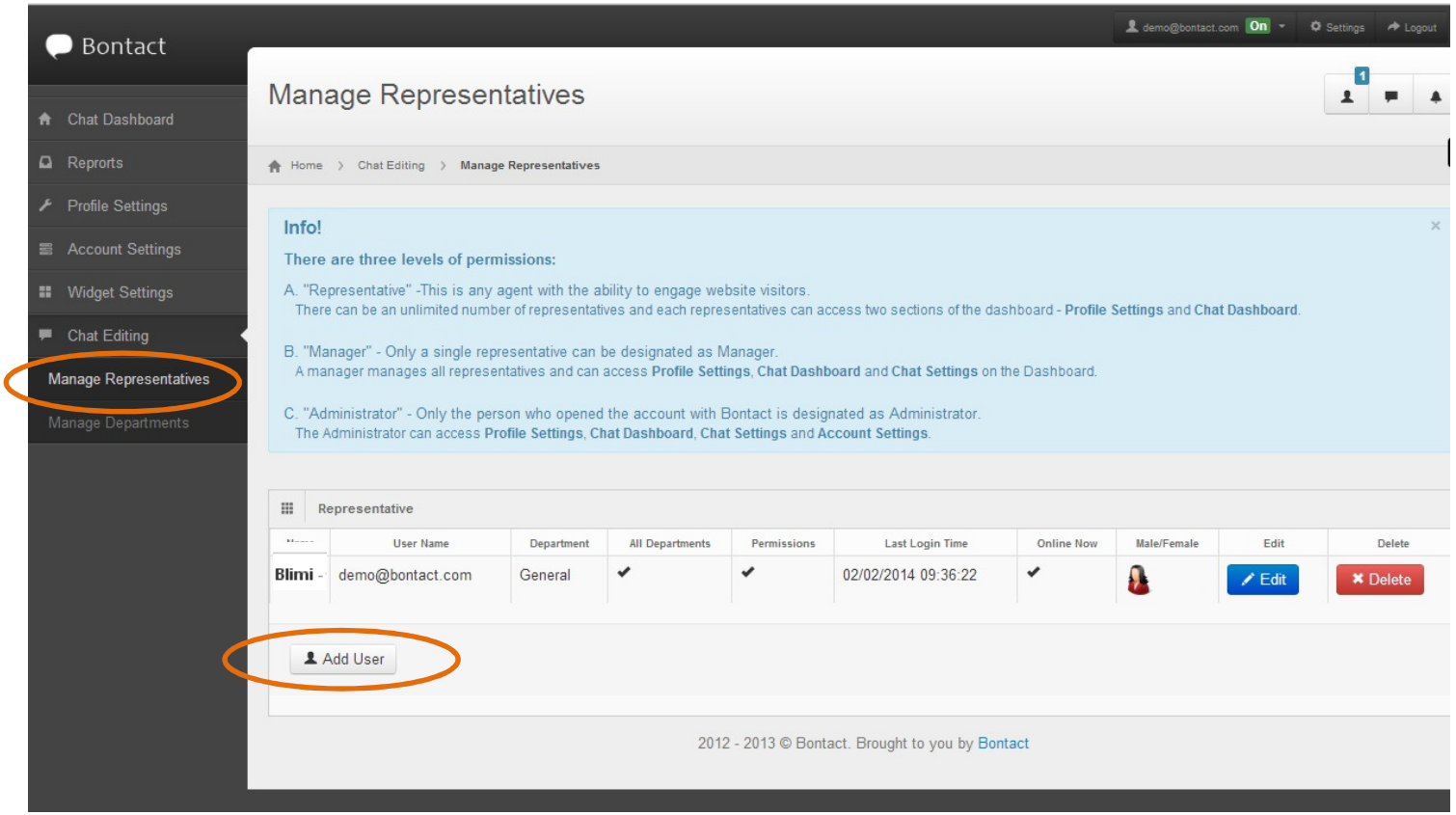
How do you initiate contact or respond to a visitor? **The list of users** is under the Online Users. Clicking on any user will display an **Invite** button, which allows you to invite a visitor to chat, or an **answer** button which allows you to respond to a visitor. If a chat is taking place, you can see its content on the **screen.** You can answer the visitors in the text field and click **send** or enter.

Dashboard Icons



On the upper right, there are boxes with icons showing:
The number of visitors in the website
The number of active calls
The number of visitors who have initiated contact and are waiting for answers.

Managing Reps and Departments


Bontact
demo@bontact.com On
Settings
Logout
Chat Dashboard
Reports
Profile Settings
Account Settings
Widget Settings
Chat Editing
Manage Representatives
Manage Departments
Manage Representatives
Home › Chat Editing › Manage Representatives
Info!
There are three levels of permissions:
A. "Representative" -This is any agent with the ability to engage website visitors.
There can be an unlimited number of representatives and each representatives can access two sections of the dashboard - Profile Settings and Chat Dashboard.
B. "Manager" - Only a single representative can be designated as Manager.
A manager manages all representatives and can access Profile Settings, Chat Dashboard and Chat Settings on the Dashboard.
C. "Administrator" - Only the person who opened the account with Bontact is designated as Administrator.
The Administrator can access Profile Settings, Chat Dashboard, Chat Settings and Account Settings.
Representative
User Name
Department
All Departments
Permissions
Last Login Time
Online Now
Male/Female
Edit
Delete
Blimi -
demo@bontact.com
General
02/02/2014 09:36:22
Edit
Delete
Add User
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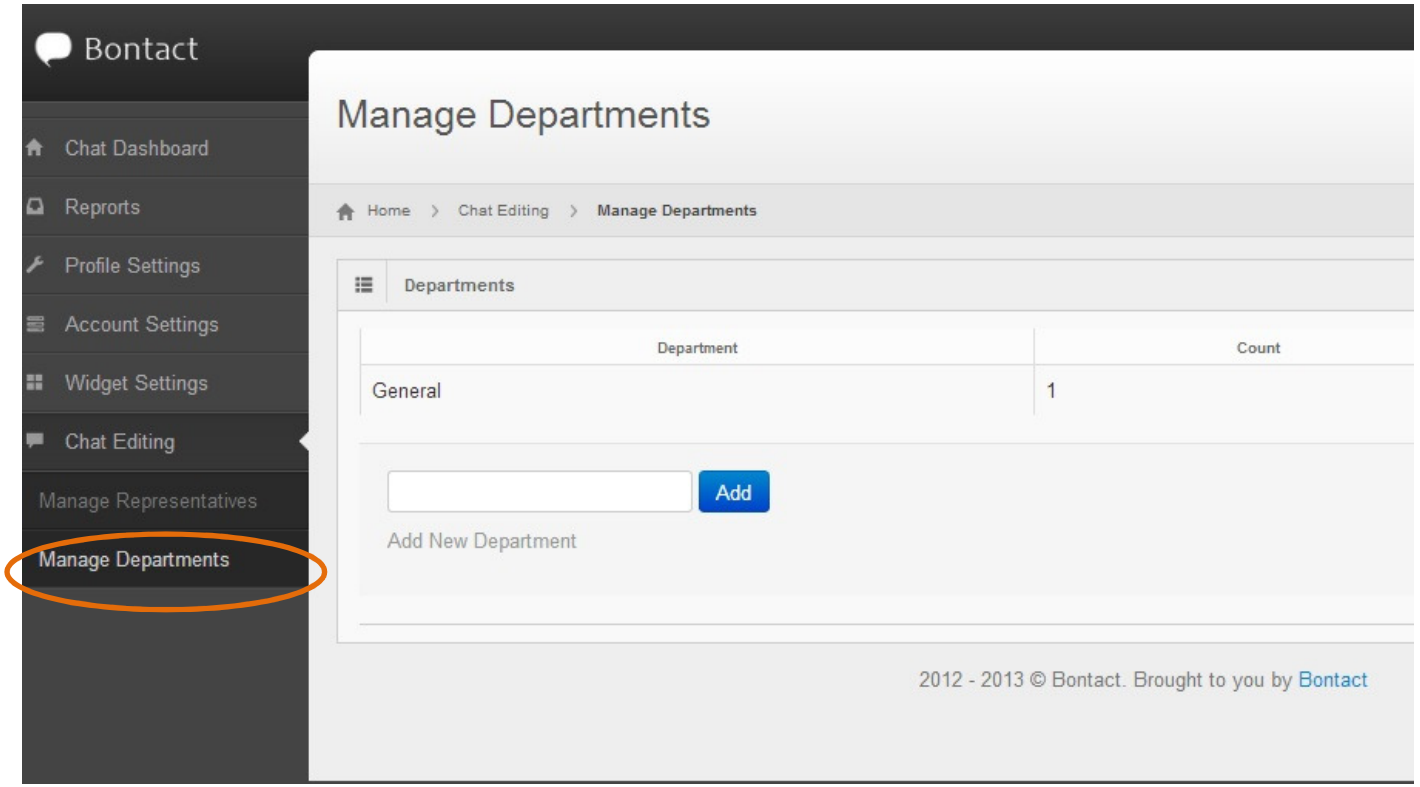
In the tab Settings-Chat Editing you can add or remove reps who will answer chats, or define departments to which visitors can refer upon need.

To add a rep, select **Manage Representatives**, click **Add User,** and in the screen that opens, edit the details of the rep and save changes.

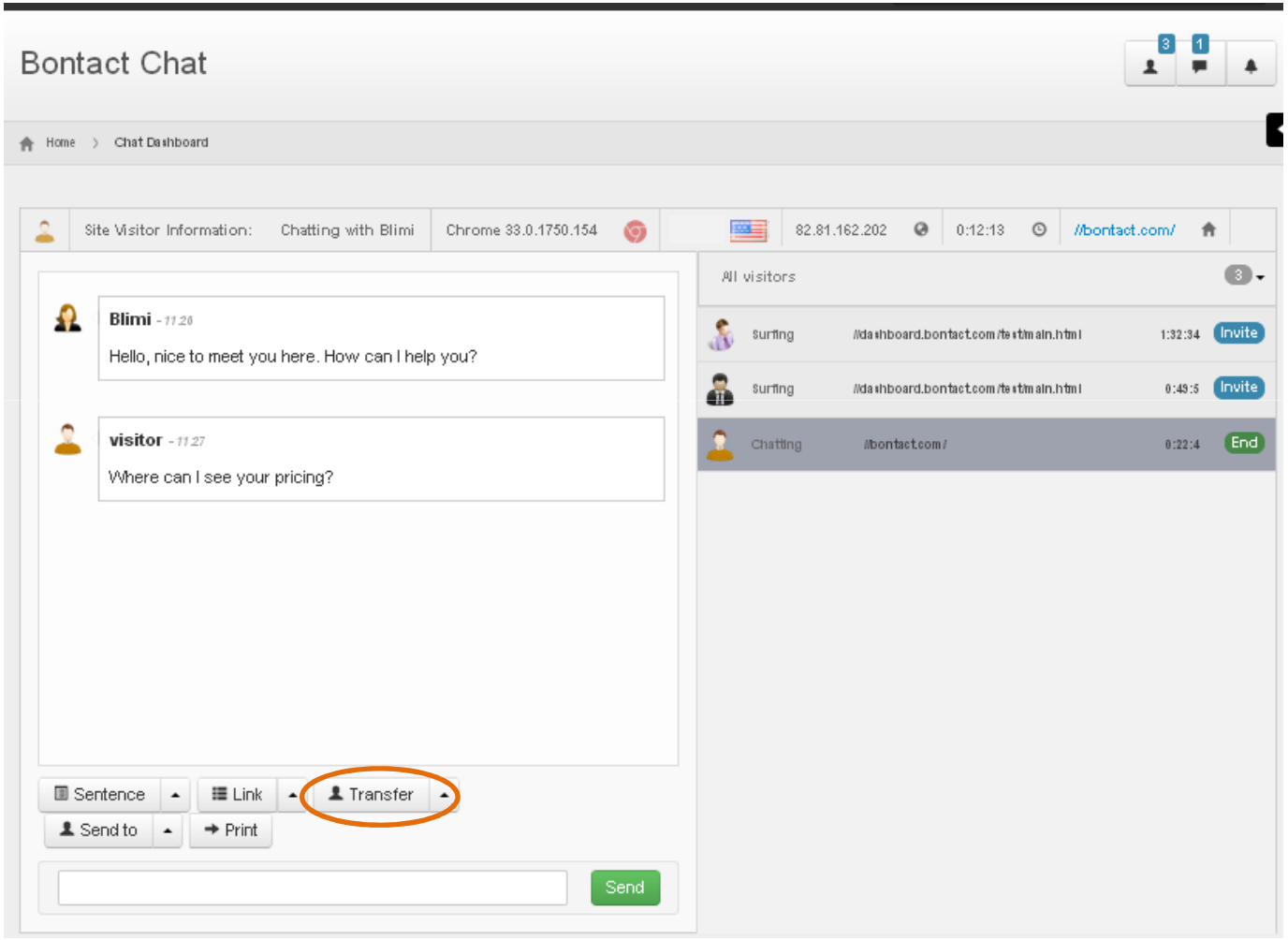
Each rep enters with his/her own user and password. You can give each rep suitable permissions. There are three levels of permissions – from viewing a personal report only with no option for changes, to managing the account and payment methods.

Managing Departments



Select **Manage Departments** and add departments according to need. After adding, the visitors will see a field enabling selection of the department they want to write to. You can assign the reps to suitable departments in the rep management screen.

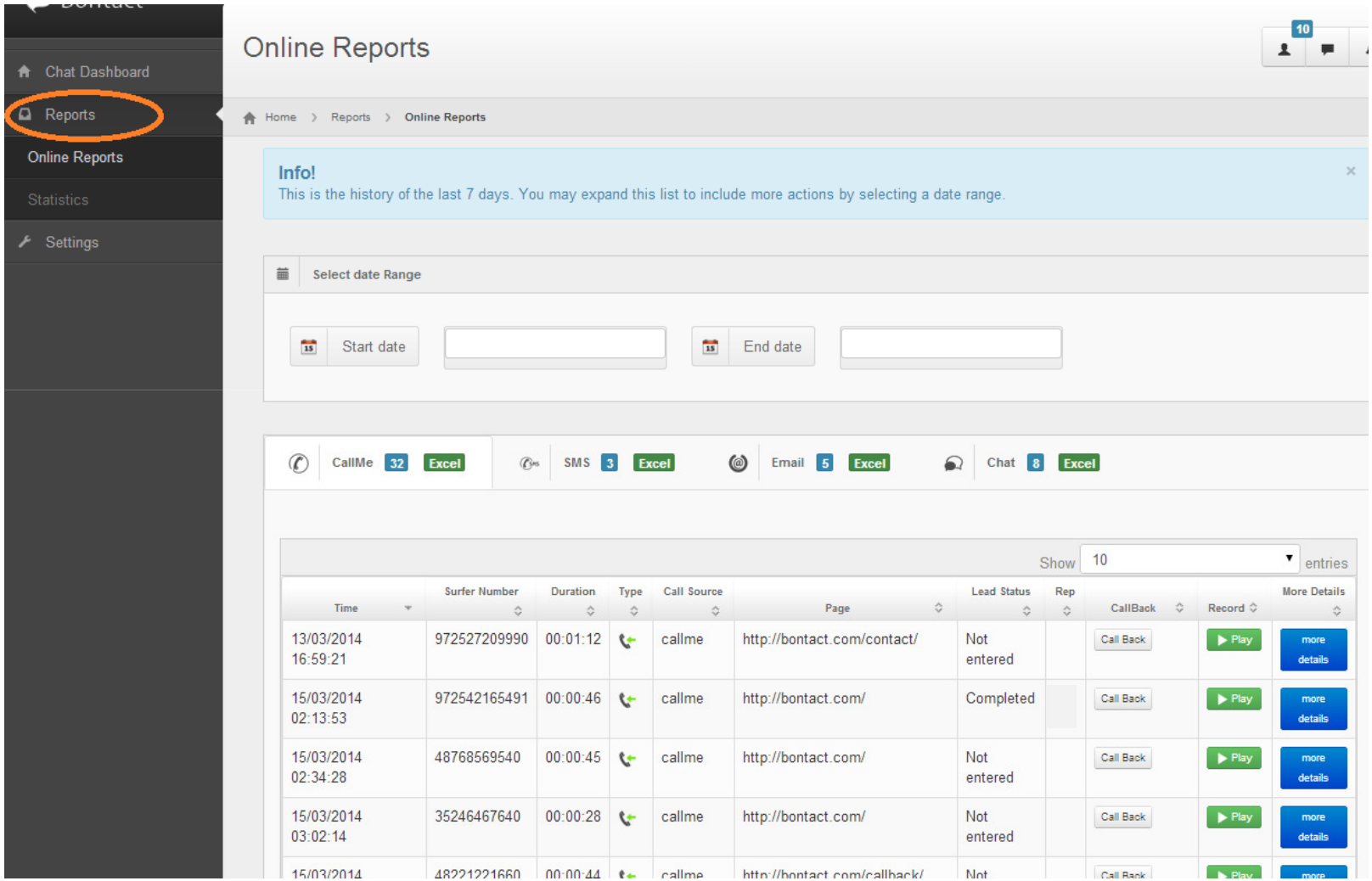
Transferring Calls Between Reps



You can transfer each call to a different representative.

Click **Transfer** on the bottom, above the text field, and transfer to another rep or dpt. In the same line you can add a sentence or link from the list you created, send the content of the conversation to your email or another email, or print out the call.

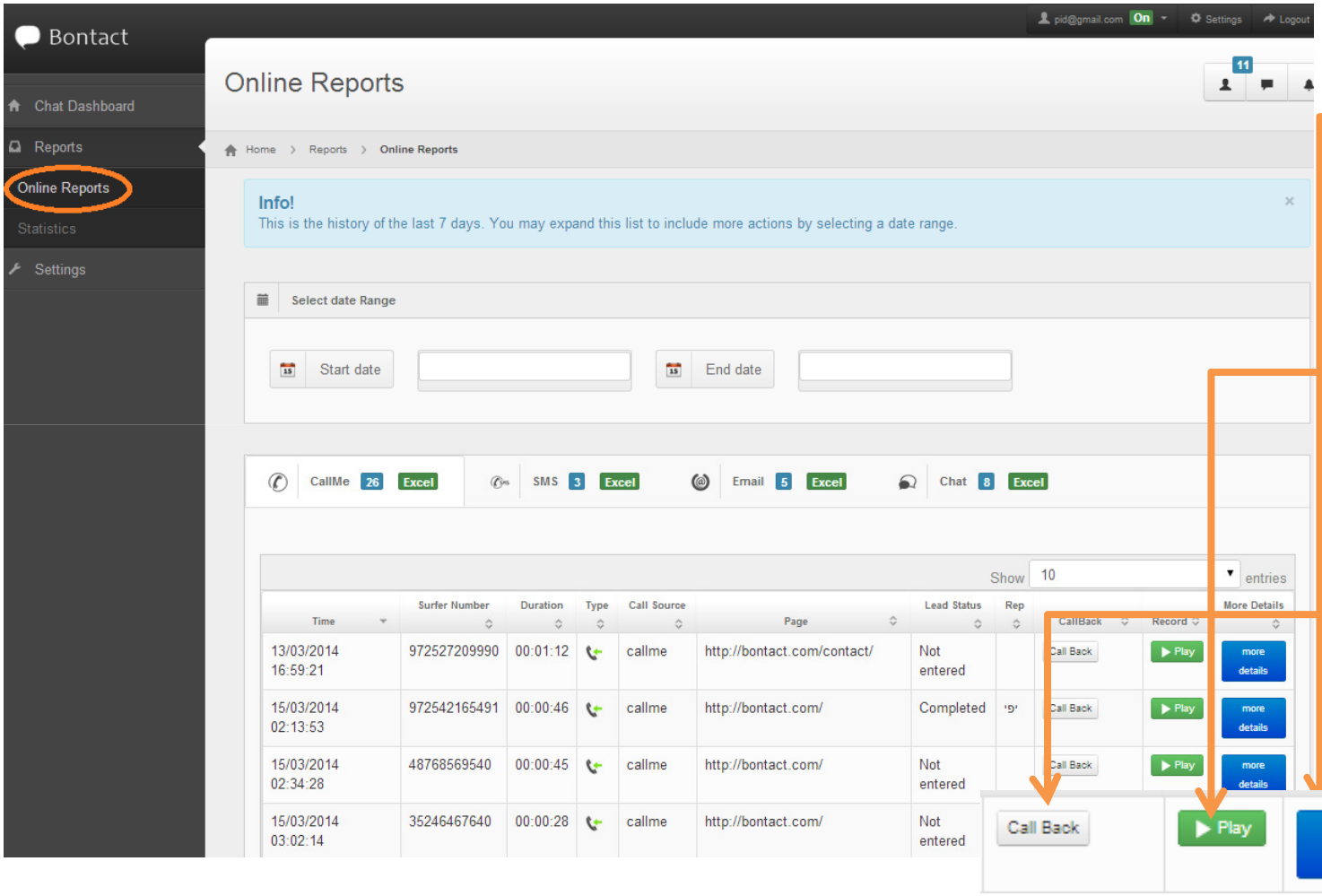
Chat report



Reports are in the Reports tab in the main menu.

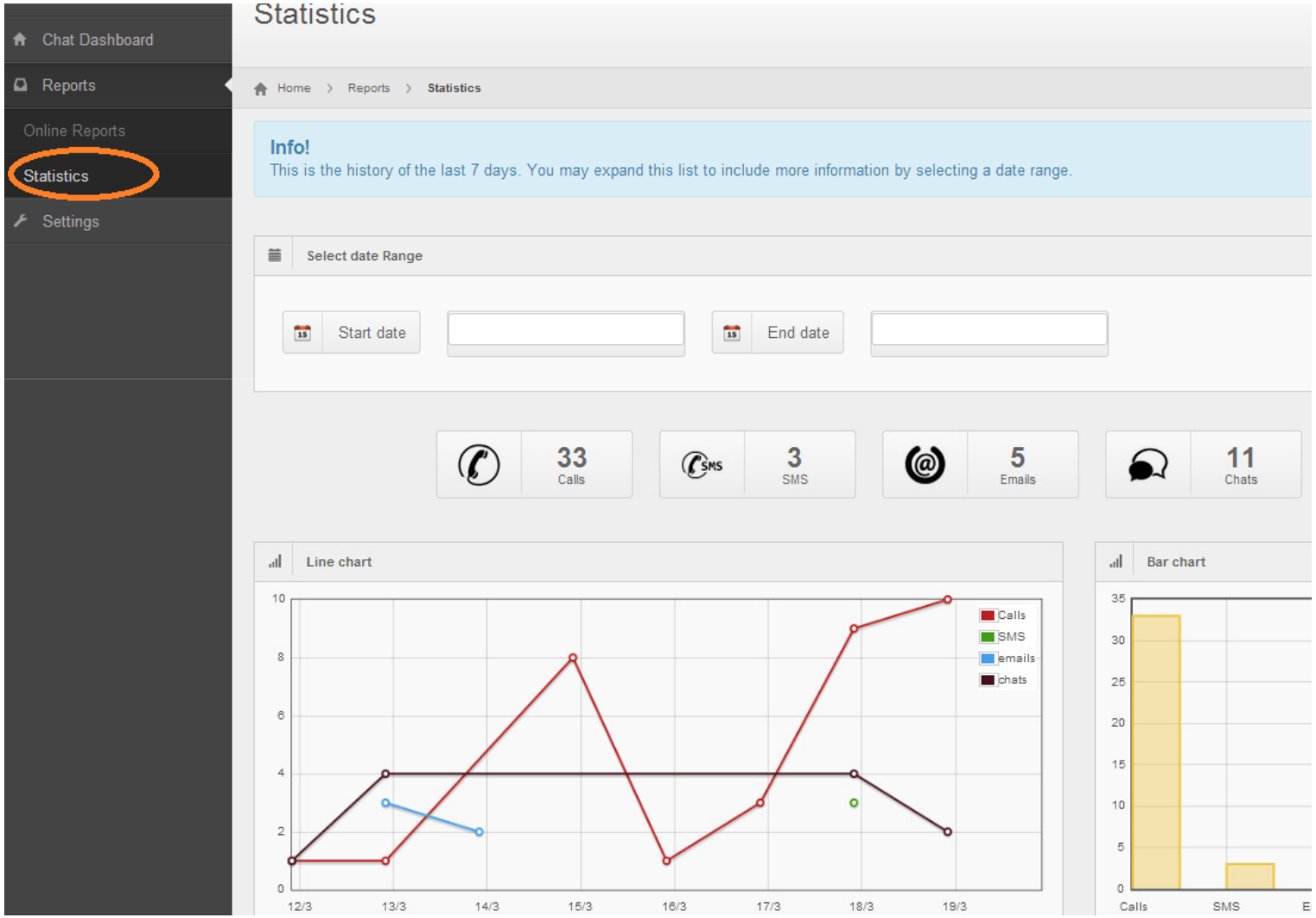
The inner tab My Reports will show your chat report as a representative. You need to select a date range.

Managing Leads



In the Online Reports tab, you can handle visitor requests. Clicking More Details on the right of each request enables entering the name of a rep, the status of each request and comments.
You can listen to the recordings by clicking Play, and answering requests from emails, callbacks and SMS.
To callback following a telephone request, click Callback. To send an SMS following an SMS, click Reply SMS, and to answer an Email, click Email Reply.

Graphical and Statistical Report



The internal Statistics tab provides a graphical display of the data. On this page you can find statistical data on the displayed pages, the Bontact service your customers prefer, and browsers which are popular with your visitors.

Please contact us with any question :)

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